



## The Indispensable LinkedIn Sales Guide for Financial Advisors: Mastering the Online to Offline Conversion

By Kevin Nichols, Matt Oechsli

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### **The Indispensable LinkedIn Sales Guide for Financial Advisors: Mastering the Online to Offline Conversion** By Kevin Nichols, Matt Oechsli

Would you like to acquire more affluent clients with the help of LinkedIn? If so, this book is for you. When used properly, LinkedIn is a tool that has enabled a small cadre of financial advisors, referred to throughout the book as Influencers, to make social selling a core part of your business development efforts.

The Indispensable LinkedIn Sales Guide for Financial Advisors is a step-by-step guide that can transform a LinkedIn novice into a LinkedIn master, while at the same time help a LinkedIn master take their social selling skills to the next level.

By combining research from three separate studies on affluent investors, elite financial advisors, and social media in the financial services industry (labeled as the Trifecta of Research), the authors create a financial advisor roadmap on how to use LinkedIn to help acquire more affluent clients.

For instance, you will learn that the personal introduction is the #1 marketing tactic to which today's affluent respond and learn how to orchestrate these types of introductions using LinkedIn. The authors refer to this as the Online to Offline Conversion or the O-2-O Conversion™. They will teach you financial advisor tested techniques on how to engage in advanced searches, join and form groups, properly engage with your connections, and brand yourself as a first class professional.

Each chapter focuses on an area that is important to mastering LinkedIn social selling, and goes into granular how-to detail. For instance, the chapter on Advanced Searches covers everything from Finding Business Owners to understanding how to use Boolean Logic, to how to find Money in Motion, and much more.

Social media has become an indispensable research tool for Influencers and the technology is only getting better. Welcome aboard our social media journey. The fun has just begun.

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- Sales Rank: #122107 in eBooks
- Published on: 2014-12-28
- Released on: 2014-12-28
- Format: Kindle eBook

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### **Editorial Review**

#### **Review**

This detailed and extremely useful book is the definitive guide on how to use LinkedIn to build relationships and your business. A must-read for all financial advisors. --Jay Baer, New York Times best-selling author of Youtility

After reading this book by Kevin Nichols and Matt Oechsli it is clear that the evolution of social selling is in full swing in the Financial Services industry. LinkedIn is the world's largest professional network and regardless of the firm you work for, there are tons of tips and strategies for Financial Advisors within. --Koka Sexton, LinkedIn Sr. Marketing Manager

I call this book the social media perfect storm. Combine Matt's experience and knowledge of FA's, Kevin's social media expertise, add in 6 years for social media to evolve and you have the industry's first social media how to guide, all from the guys who help you get Results. A must read! --David Patchen, Senior Vice President, PCG Education & Practice Management, Raymond James

#### **About the Author**

Kevin Nichols is the Director of Coaching and Social Media at the Oechsli Institute. He is a leading expert on social media marketing and delivers speeches and conducts workshops throughout the country. He has coached hundreds of financial professionals and wealth management teams on leveraging social media to build influence and gain new clients. He also writes The Social Media Advisor blog for WealthManagement.com and has been heavily published by numerous additional publications.

Matt Oechsli is a leading authority on attracting, servicing, and retaining affluent clients. He is a high-demand speaker; delivering speeches from Singapore to South Africa to Wall Street. He has authored 13 books, a number of which are industry best sellers, and is the longest tenured columnist for Registered Rep Magazine at 20 years and counting. Matt's research and industry expertise have him consistently quoted in the New York Times, Wall Street Journal, and other prominent media outlets. He is truly a voice of experience.

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#### **Maria Scully:**

In this 21st century, people become competitive in every way. By being competitive now, people have to do something to make these individuals survive, being in the middle of the actual crowded place and notice through surrounding. One thing that oftentimes many people have underestimated the item for a while is reading. Yep, by reading a book your ability to survive boost then having chance to remain than other is high. For you who want to start reading the book, we give you that The Indispensable LinkedIn Sales Guide for Financial Advisors: Mastering the Online to Offline Conversion book as beginning and daily reading reserve. Why, because this book is usually more than just a book.

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